# So *What*?

## An Impact Measurement Toolkit

with

**Airbel Impact Lab**

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# INTRODUCTION

> **Impact measurement allows us to understand how much change can be credited to a specific project or activity.**

It is a practice that can benefit non-profit organizations, for-profit businesses, practitioners, and students alike. The right impact measurement strategy helps us understand the value of our work at a deeper level.

Impact measurement can lead to hard facts that can be used for **fundraising, marketing, and learning purposes.**

With *So What?*, you will be able to identify the signals of your impact, create a method for capturing those signals, and leverage a simple framework for evaluating your approach to impact measurement.

*In parts of the toolkit, we are inspired by the Social Ecological Model Adapted from: Bronfenbrenner, U. (1977). Toward an experimental ecology of human development. American Psychologist, 32(7), 513-531.*

# THIS TOOLKIT IS IDEAL FOR:

- **Non-profits and social enterprises launching a new program or initiative.**

- **For-profits launching a new product or service.**

- **Student projects.**

- **Practicing professionals that can use this to create a strategy for measuring the impact of a project.**

**Time:** 30-60 minutes
**Materials:** Pen, Paper

# Part 01: GOAL ---------------------------------

Before you can create an impact measurement strategy, you need to know the kind of impact you hope to have. To do this, think about the **mission** of the current project (initiative, product, service, etc.) that you want to develop an impact measurement strategy for during this exercise.

**To begin, reflect on the following questions, and provide a short phrase to summarize your reflection:**

*What* are you trying to accomplish?

Who are you trying to accomplish this for?

**Next, capture the spirit of this project by filling out the goal statement template below:**

## Our goal is to [What?] for [Who?].

*For example: Our goal is to [provide timely information on mental health] for [people who suffer from mental illness].*

# PART 01

Now that you have a simple goal statement, **it's time to ask: "so what?".**
To build upon the end goal or vision for the project, ask "so what?" three times.
Each time you ask "so what?", you are digging deeper into your previous answer in order to better understand the purpose of your goal, the intended outcome, and the unintended consequences.

> *For example: Our goal is to [**provide timely information on mental health**] for [**people who suffer from mental illness**].*
>
> *So what? So that we support people who are looking for help.*
> *So what? So that they are referred to specialists who can provide ongoing care.*
> *So what? So that they no longer suffer from mental illness and experience wellbeing as they define it.*

**So what?** *In response to your goal statement.*

**So what?** *In response to the previous response.*

**So what?** *In response to the previous response.*

Based on the results from the So What? exercise, further develop your goal statement from before. It's ok if you need to revise your language a bit to fit.

# Our goal is to
# [What?] for [Who?] so that [So What?].

*For example: Our goal is to [provide timely information on mental health] for [people who suffer from mental illness] so that [they no longer suffer from mental illness and experience wellbeing as they define it].*

Next, let's reflect on *how* you will accomplish this work. Continue developing your goal statement below.

# Our goal is to
# [What?] for [Who?] so that [So What?] by [How?]

*For example: Our goal is to [provide timely information on mental health] for [people who suffer from mental illness] so that [they no longer suffer from mental illness and experience wellbeing as they define it] by [building an accessible website platform].*

# Part 02: PICTURE SUCCESS ------------------------------

What changes do we want to see? Now that you've completed your goal statement, it's time to imagine the world your project has the potential to create.

The template below provides space to reflect on various levels of the ecosystem:

- **Community/cultural level**

- **Organizational/environmental level**

- **Interpersonal relationship level**

- **Individual (including behavioral) level**

Keep in mind that not all solutions have to exist at every level of the ecosystem.

**Fill out what makes the most sense for your project based on the goals you have.**

*For example: In response to our three "so what?" reflections, we might imagine…*

| What changes do we want to see... | |
|---|---|
| **…on the community/ cultural level?** | *A world where mental illness is not stigmatized because it is understood.* |
| **…on the organizational/ environmental level?** | *A world where those people offering help, have access to the right resources.* |
| **…on the interpersonal relationship level?** | *A world where those people who are suffering mental illness know who to reach out to.* |
| **…on the individual (including behavioral) level?** | *A world where people know the steps to live a healthy and balanced life.* |

**What changes do we want to see...**

| | |
|---|---|
| **...on the community/ cultural level?** | |
| **...on the organizational/ environmental level?** | |
| **...on the interpersonal relationship level?** | |
| **...on the individual (including behavioral) level?** | |

Select one of the changes you described on the previous page that you would like to see to move forward with the rest of the exercise. Don't worry, you can always repeat this exercise multiple times if you came up with more than one.

*For our example scenario, we'll move forward with* **"a world where people who are suffering mental illness know who to reach out to."**

Now that the ideal future world is envisioned, make it more tangible by mapping out some of the practical and observable aspects of it.

To help you do this, we have a series of prompts below:

*For example, with* **"a world where people who are suffering mental illness know who to reach out to,"** *we might walk away from this exercise with something like this:*

| Think about what the person's daily life is like... | |
| --- | --- |
| **What will they see and feel?** | *Increased social ties and increase in the number of unique interactions in a day.* |
| **Who or what will they interact with?** | *Active engagement with mental health resources / professionals.* |
| **What changes will they experience in their life?** | *Increase in the amount of time spent in the company of others per day.* |

**Think about what the person's daily life is like...**

| | |
|---|---|
| **What will they see and feel?** | |
| **Who or what will they interact with?** | |
| **What changes will they experience in their life?** | |

Next, continue the process by thinking about the approach you will take to identify, capture, and evaluate. In doing so, you will **develop an initial impact measurement strategy.**

# Part 03: IDENTIFY  -----------------------------------

The first step to measuring impact is understanding the signals you can track to identify any change that has taken place as a result of your work.

As we explored in Part 02 of the toolkit, changes may include:

█ **1. Changes in community and culture**

█ **2. Changes in organization and environment**

█ **3. Changes in interpersonal relationships**

█ **4. Changes in the individual (including behavior change and interactions)**

Previously, you had selected one of these change categories. Let's continue working on that. Based on the change area you are focusing on, **what are the signals of the impact? How will you know a change has taken place? What signals will you pick up on to verify that change?** Use the template below to complete this exercise.

█ **Try your best to brainstorm three signals.**

*For example, with our scenario, we might walk away from this exercise with something like this:*

| How will we know a change has taken place? | |
| --- | --- |
| **The change we are seeking to make:** | **The signals we will use to pick on that change:** |
| *A world where people who are suffering mental illness know who to reach out to.* | *Number of people clicking the "reach out" button on our website.* |
| | *Number of people emailing or calling.* |
| | *Increase in the numbers of people survey participants say they are meaningfully in touch with.* |

# Brainstorm Exercise

| How will we know a change has taken place? | |
|---|---|
| **The change we are seeking to make:** | **The signals we will use to pick on that change:** |
| | |

## Part 04: CAPTURE

Now that we have an understanding of the change we are seeking to make, and the potential signals we can use to pick up on that change, it's time to further reflect:

# How are you collecting these signals?

Methods for collecting may include insights from:

**1. Sales analytics**

**2. Website analytics (i.e. page views and behavior)**

**3. Surveys**

**4. Tech tools (i.e. fitbit, streaming cameras)**

**5. Observational studies**

**6. Score sheets**

**7. One on one interviews**

The methods you select, and the way in which you leverage these methods are really important. Here are some best practices to keep in mind:

**Observing is far better than self-reported behaviors.**

**Usage data is better than asking people to recall their own behaviors.**

**If you're stuck with self-reported data, make sure it's valid.
E.g. ask others in the know to confidentially verify the self reported behavior.**

For the purpose of this exercise, **select just one of the three signals** you brainstormed in Part 03, and use the template on the next page to determine a method you could use to collect insights on the impact you've made.

*For example, with our scenario, we might walk away from this exercise with something like this:*

| How will we know a change has taken place? | | |
| --- | --- | --- |
| **The change we are seeking to make:** | **The signals we will use to pick on that change:** | **The methods we will use to capture insights:** |
| *A world where people who are suffering mental illness know who to reach out to.* | *Number of people clicking the "reach out" button on our website.* | *Website analytics* |

| How will we know a change has taken place? | | |
| --- | --- | --- |
| **The change we are seeking to make:** | **The signals we will use to pick on that change:** | **The methods we will use to capture insights:** |
| | | |

# Part 05: EVALUATE ----------------------------------

**Reflect on your level of confidence in this strategy.**

Will you learn the right things from this? Are the **signals** correct? Could **power dynamics and privilege** be affecting user's feedback during data collection? How can you ensure that the changes you've seen/measured are due to your work and not some other change?  Is the **method to capture** these signals and identifiers correct? Will the impact/change you see last over time?

■ **Reflect on these, and revisit the earlier stages if need be.**

Possible evaluation methods may include:

⟩ **Compare with status quo based on desk research**.

⟩ **Compare with previous data of your business with change in data post changes**.

⟩ **Compare with a control group or individual who hasn't received your initiative/ product/service.**

⟩ **Compare it to your vision or strategic plan: are you going in the right direction?**

⟩ **User score or reviews of your product/service.**

■ **Next, reflect on what each of these look like for your project:**

⟩ **Beneficence** (benefits outweigh risks) - what will the research subjects get out of participating? Are they being compensated for their time? What risk are they taking on by participating.

⟩ **Justice** (participants don't overly bear burden of research).

⟩ **Respect for participants** (best interests of participants are considered and privacy is maintained).

Finally, once you are confident in your approach, complete the template on the following page to create a record of your journey through the *So What?* toolkit!

*For example, with our scenario, we might walk away from this exercise with something like this:*

## Impact Measurement Strategy

| What are you trying to accomplish? | Who are you trying to accomplish this for? | Why does this matter? [So What?] |
|---|---|---|
| *Provide timely information on mental health.* | *People who suffer from mental illness.* | *So that they no longer suffer from mental illness and experience wellbeing as they define it.* |
| **What change are you trying to make?** | **What signal will you use to pick up on that change?** | **What method will you use to capture insights?** |
| *A world where people who are suffering mental illness know who to reach out to.* | *The number of people clicking the "reach out" button on our website.* | *Website analytics.* |

### How will you accomplish this work?

*By building an accessible website platform.*

## Impact Measurement Strategy

| What are you trying to accomplish? | Who are you trying to accomplish this for? | Why does this matter? [So What?] |
| --- | --- | --- |
| | | |

| What change are you trying to make? | What signal will you use to pick up on that change? | What method will you use to capture insights? |
| --- | --- | --- |
| | | |

How will you accomplish this work?

# FINALLY

**A word on best practices and ethics for impact measurement:**

Ethical considerations are essential to collecting accurate data and ensuring no harm is done to participants. If research falls outside of a formal ethics review process, where an institutional review board (IRB) reviews the risks and benefits of research for the participants and approves (or not) the study, some activities may still carry risks for participants so there is still a need for clear ethical principles and a sound process for weighing the risks and benefits. The principles used in the design process should apply the same ethical standards for research: ensuring beneficence (benefits outweigh risks), justice (participants don't overly bear burden of research) and respect for participants. (likely more to include)

**Along with clarity of principles, a clear process should be determined.**

For IRC, this meant instituting an ethical review with two focal points in the organization who are not part of the project and who have knowledge of ethics and of the context. These reviews follow an adapted ethical review similar to an ethics review board and are set up for quick turnaround (24 hours) so as not to slow down iterative learning and adaptation. They help raise ethical issues to safeguard participant welfare.

# THANK YOU

**for exploring the *So What?* toolkit!**

This toolkit was created in partnership between **verynice** and the **Airbel Impact Lab,** the research and innovation team at the **International Rescue Committee,** and published by Reginald. If you have any questions or feedback regarding the toolkit, please do not hesitate to contact info@verynice.co.

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